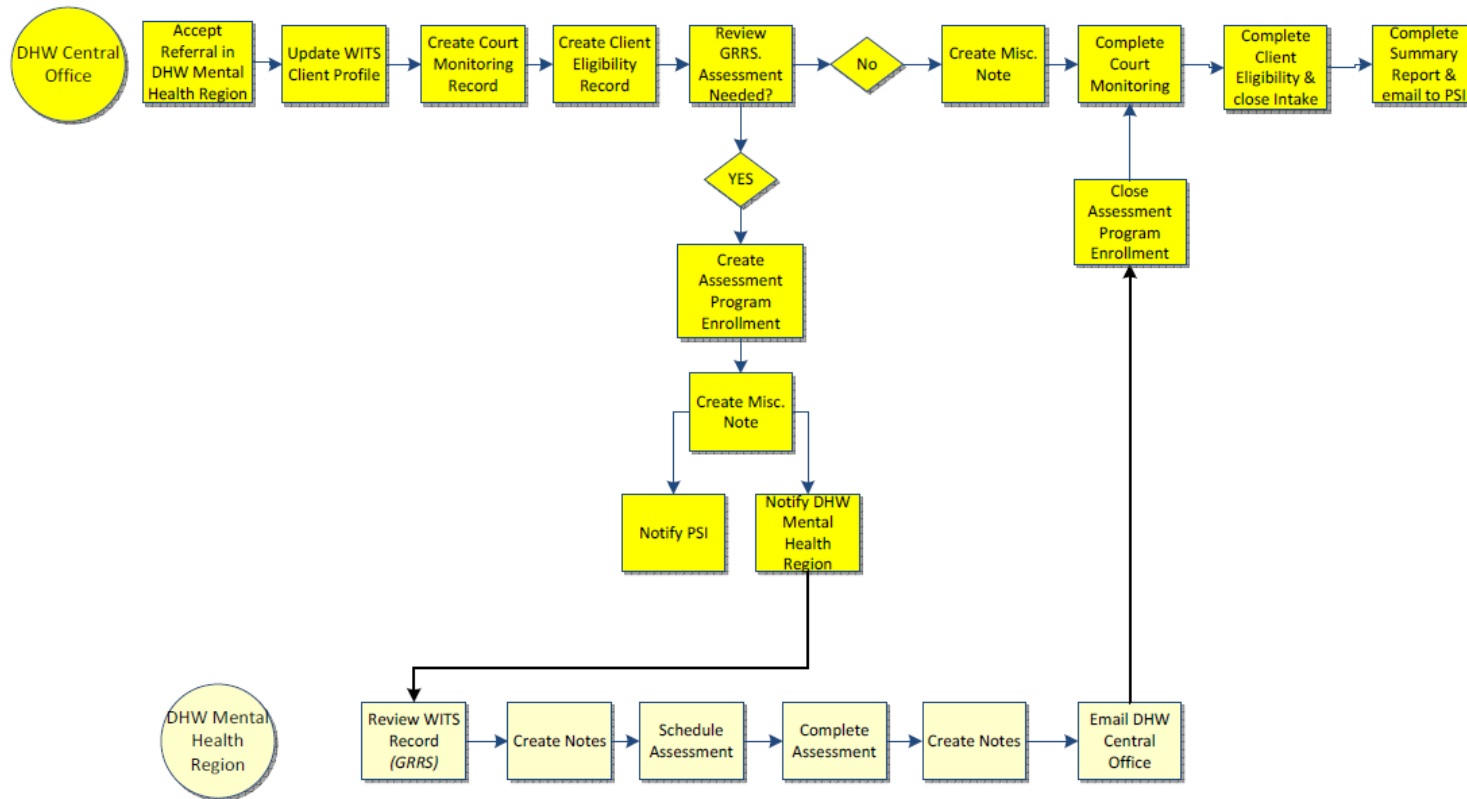


Central Office - Process for a 19-2524 client who needs an Idaho Mental Health Assessment (IDMHA)

Client Flow

19-2524 Assessment Only Process



- A. Accept the Referral in a DHW Mental Health Region.
- B. Update the WITS Client Profile with any changes.
- C. Create the Court Monitoring Record.
- D. Create the Client Eligibility Record.
- E. Review GRRS and identify if an Assessment is needed.
 - a. Proceed with these instructions for clients who need an IDMHA.
- F. Create a 19-2524 Assessment Only program enrollment using the directions below [\(click here for printable instructions\)](#).

Creating a 19-2524 Assessment Only program enrollment



The program enrollment will be created by Central Office Staff when the client is sent to a Region for an IDMHA Assessment.

Begin on the client activity list.

User: Buskey, Michelle, test | Location: IDHW, DBH, Region 4, Boise | Snapshot

Client: 192524, Albert | 105291681236014 | 2 | Clear Client

- Home Page
- Agency Contacts
 - Agency
 - Dispensary
 - Group List
- Clinical Dashboard
- Client List
 - Client Profile
 - Gain Short Screener
 - Benefit Application
 - Linked Consents
 - Client Contacts
 - Non-Episode Contact
 - Activity List
 - Intake
 - Client Eligibility
 - Fee Determination
 - Court Monitoring
 - Drug Testing
 - Wait List
 - Assessments
 - Diagnosis List
 - Admission
 - Program Enroll**

Client Activity List

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	7/27/2016	5/30/2012	Completed
	Intake Transaction	7/27/2016	7/27/2016	Completed
	Court Monitoring Form	7/27/2016	7/27/2016	In Progress Details

1. Once you're in the activity list, click **Program Enroll** on the blue navigation pane.

Client: 19-2524, Client | 10827169000003L | 2 [Clear Client](#)

Program Enrollment

Program Name Facility

Modality

Active Program Enrollments During Date Range From: To:

Program Enrollment List

Actions	Program Name	Start Date	End Date	Facility	Notes

- Click **Add Enrollment** on the right side of the program enrollment list bar.



The start date is the day Central Office notifies a Region of the need to complete an IDHMA Assessment for a 19-2524 client.

The screenshot shows a web form titled "Program Enrollment Profile" with a blue header bar. The form contains several input fields: "Facility" (a dropdown menu with "Boise" selected), "Program Name" (a dropdown menu with a yellow background), "Program Staff" (a dropdown menu with "Brownfield, Michelle" selected), "Termination Reason" (a text input field), and "Notes" (a larger text area). To the right of these fields are "Days on Wait List" (a text input field), "Start Date" (a date picker showing "7/28/2016"), and "End Date" (a date picker). At the bottom right are three buttons: "Cancel" (red), "Save" (green), and "Finish" (blue). Two red arrows are overlaid on the form: one points from the bottom left towards the "Program Name" dropdown, and the other points from the bottom right towards the "Start Date" date picker.

3. Select the program of 19-2524 Assessment Only and enter the start date (day Central Office notifies a Region of the need to complete an IDHMA Assessment for a 19-2524 client).

Program Enrollment Profile

Facility: Days on Wait List: Start Date:

Program Name: End Date:

Program Staff:

Termination Reason:

Notes:

4. Click and .

Program Enrollment

Program Name: Facility:

Modality:

Active Program Enrollments During Date Range: From: To:

Program Enrollment List [Add Enrollment](#)

Actions	Program Name	Start Date	End Date	Facility	Notes
	19-2524 Assessment Only	7/20/2016		Boise	

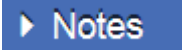
5. WITS will take you back to the program enrollment list. Click to return to the client activity list.

G. Create a 19-2524 Miscellaneous Note using the directions below [\(click here for printable instructions\)](#).

Creating a Central Office 19-2524 Misc. Note

Begin on the client activity list.

Client Activity List				
Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	7/15/2016	5/13/2013	Completed
	Intake Transaction	7/15/2016	7/28/2016	Completed
	Client Program Enrollment (19-2524 Assessment Only)	7/20/2016	7/28/2016	Completed
	Mental Health Assessment	7/27/2016	7/28/2016	Completed
	Client Program Enrollment (19-2524 Concurrent Program)	7/28/2016	7/28/2016	Completed
	Miscellaneous Note Summary	7/28/2016	7/28/2016	Not Applicable
	Court Monitoring Form	7/28/2016	7/28/2016	Completed
	Diagnosis Summary	7/28/2016	7/28/2016	Not Applicable

1. Click  on the blue navigation pane.

Notes Search

Start Date

8/2/2015

End Date

8/1/2016

Allow Disclosure of Note

Clear

Go

Notes List

Print Notes

Add New Encounter Note

Add New Misc. Note

Actions	Note Type	Date	Duration	Staff	Service/Summary

- Click **Add New Misc. Note** on the right side of the notes list blue bar.



Central Office staff will not select a program enrollment when creating a miscellaneous note for a 19-2524 client.

Miscellaneous Notes

Author Name: Van Skike, Anna
Author Title:
Created Date:

Note Type: 19-2524 Note

Program

Frequency

Summary

Signed Notes

Service Date

Start Time

End Time

Duration

Alert: No [Mark Alert](#)

Was Report Sent to State

Release these notes? No [Cancel](#) [Save](#) [Finish](#)

Unsigned Notes

[Add Note](#) [Sign Note](#)

3. Select the note type of 19-2524 Note.
4. Complete all other required fields.

Miscellaneous Notes

Author Name: Van Skike, Anna

Author Title:

Created Date:

Note Type19-2524 Note

Service Date8/1/2016

Duration15Min

Program

Start Time9:00 AM

AlertNoMark Alert

Frequency

End Time9:15 AM

Was Report Sent to State

SummarySummany Here

Signed Notes

Release these notes?No

Cancel

Save

Finish

Unsigned Notes

Add Notes

Add Note

Sign Note

5. Enter notes in the Unsigned Note section and click

Sign Note

Miscellaneous Notes

Author Name: Van Skike, Anna

Author Title:

Created Date:

Note Type19-2524 Note

Service Date8/1/2016

Duration15Min

Program

Start Time9:00 AM

AlertNoMark Alert

Frequency

End Time9:15 AM

Was Report Sent to State

SummarySummany Here

Signed Notes

Signed by Van Skike, Anna, 8/1/2016 4:43:09 PM:
Add Notes

Unsigned Notes

Release these notes?No

Cancel

Save

Finish

Add Note

Sign Note

6. When your note is signed it will move up to the signed note section and will include a date and time stamp. Click

Finish

H. Complete the 19-2524 Process.

a. Notify the PSI and Region (outside of WITS).

I. Close the 19-2524 Assessment Program when you are notified the Region has completed their portion using the directions below [\(click here for printable instructions\)](#).


Closing a 19-2524 Assessment Only program enrollment



The program enrollment will be closed by Central Office Staff (using the date the Region sent notification to Central Office).

Begin on the client activity list.

Client Activity List				
Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	7/15/2016	5/13/2013	Completed
	Intake Transaction	7/15/2016	7/28/2016	Completed
	Client Program Enrollment (19-2524 Assessment Only)	7/20/2016	7/28/2016	Completed
	<div>Review</div> Form	7/28/2016	7/28/2016	In Progress (Details)


1. Find the 19-2524 Assessment Only program enrollment in the activity list and hover over  and click **Review**.



The end date of the program enrollment will be the date the Region sends notification to Central Office (not the day the information is reviewed).

Program Enrollment Profile

Facility	Boise	Days on Wait List	<input type="text"/>	Start Date	7/20/2016	
Program Name	19-2524 Assessment Only			End Date	<input type="text"/>	
Program Staff	Brownfield, Michelle					
Termination Reason	<input type="text"/>					
Notes	<input type="text"/>					



2. Enter the end date (**date the Region sends notification to Central Office**).

Program Enrollment Profile

Facility	Boise	Days on Wait List		Start Date	7/20/2016
Program Name	19-2524 Assessment Only			End Date	7/28/2016
Program Staff	Brownfield, Michelle				
Termination Reason					
Notes					

Cancel Save Finish

3. Select the termination reason:

- **Select Treatment Completed if an IDMHA was completed**
- **Select Admin Termination of there was no IDMHA completed.**

4. Click **Save** and **Finish**.

Program Enrollment

Program Name Facility


Modality

From: To:

Active Program Enrollments During Date Range

[Clear](#) [Go](#)

Program Enrollment List [Add Enrollment](#)

Actions	Program Name	Start Date	End Date	Facility	Notes
	19-2524 Assessment Only	7/20/2016	7/28/2016	Boise	

[Finish](#)

5. WITS will take you to the program enrollment list. Click [Finish](#) to return to the client activity list.

J. Complete the 19-2524 Process for a client with an IDMHA.

- Complete the Court Monitoring Record.
- Complete the Client Eligibility Record.
- Close the Intake only if the client is NOT in treatment in the Region.
- Complete the Summary Report and email to PSI.